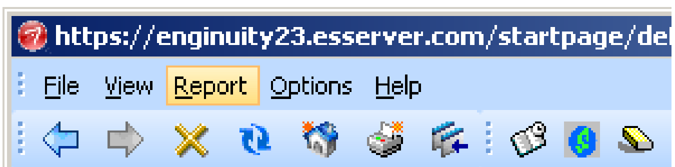
HMIS Ad Hoc Reports | ***All Facilities***

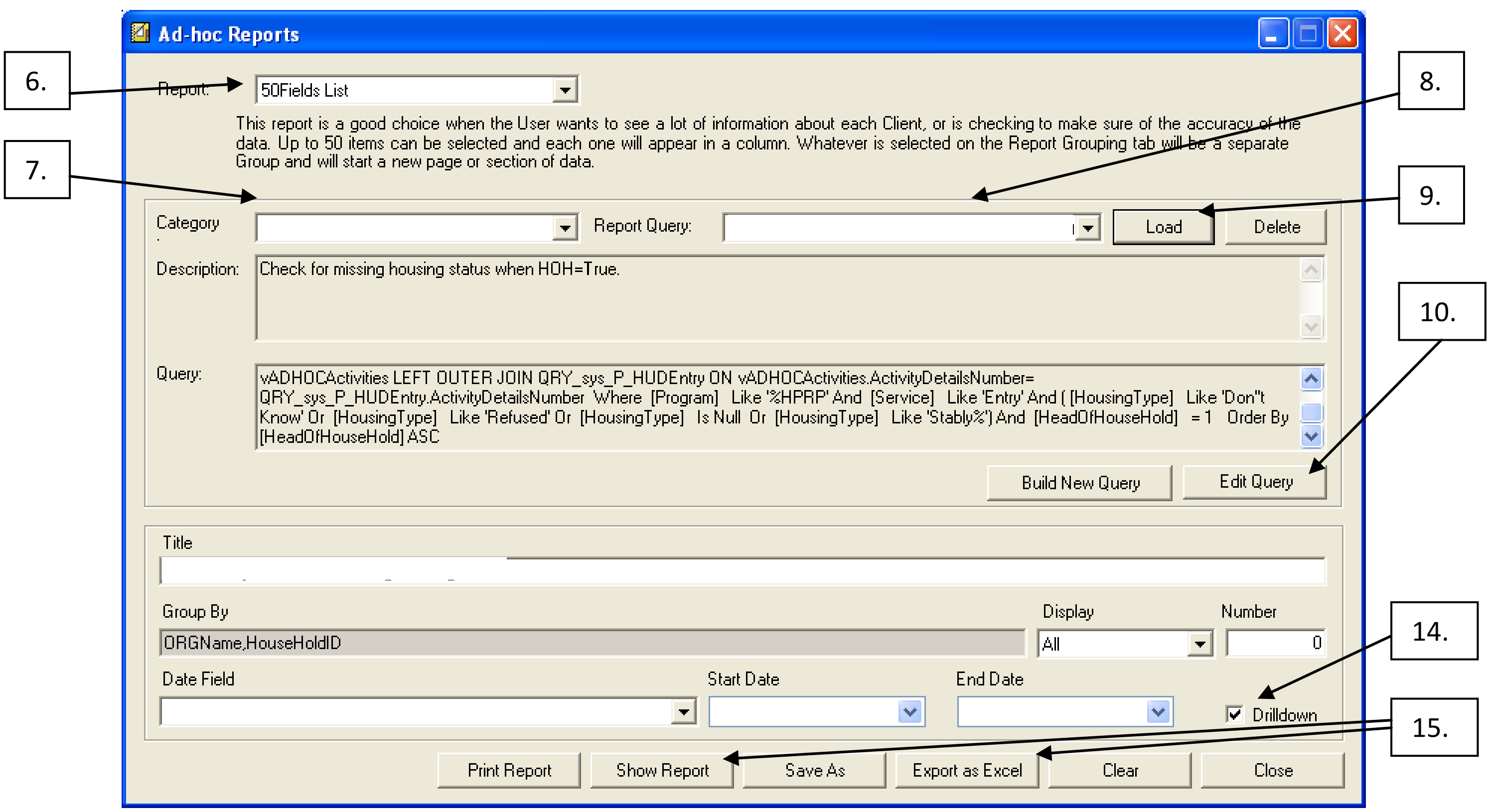
These instructions walk you through the process of running your *All Facilities* HMIS ad hoc report. This report must be submitted to your Commerce CHG Manager monthly along with the *All Rent* HMIS ad hoc report and the *Voucher Distribution Form* and *Voucher Detail Worksheet* (located in the *CHG Invoice Form*).

Running a saved Ad Hoc Query:

1. Log into HMIS
2. Go to the top of the screen and find the “Report” tab.

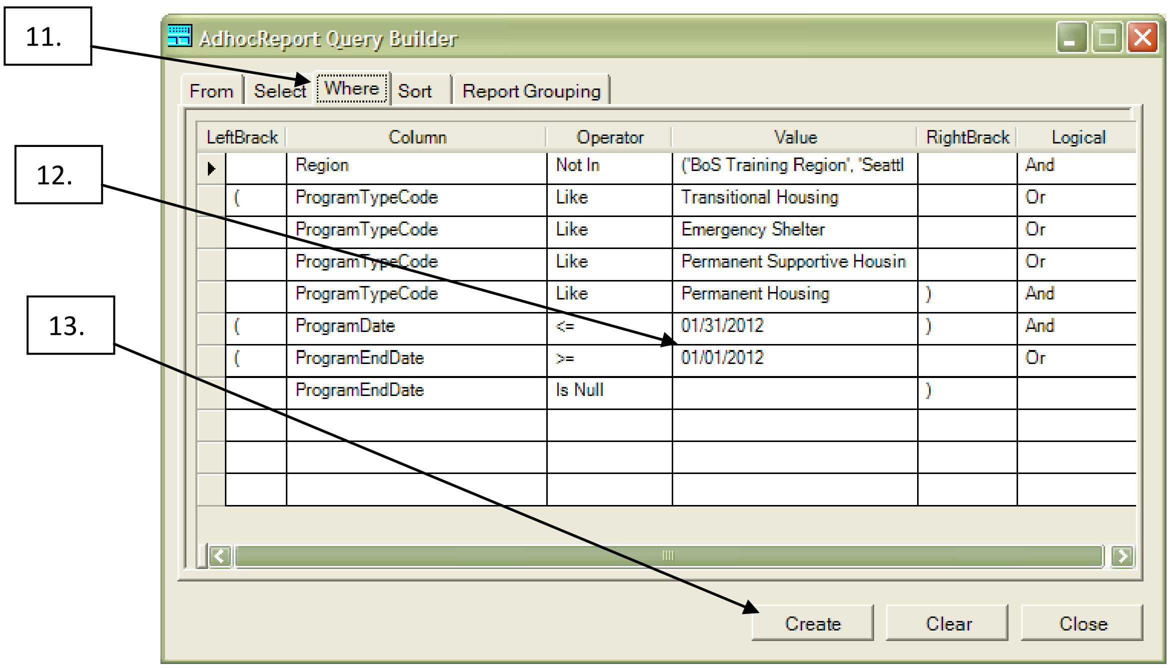


3. Click the “Report” tab to pull up the menu.
4. Click on “Ad-Hoc Reports”
5. The following screen should appear:



6. In the “Report” dropdown at the top of the page, make sure it says “50Fields List” (that is the default)

7. In the “Category” dropdown, select “CHG”
8. In the “Report Query” dropdown, select “All Facilities”
9. Click the “Load” button
10. Click the “Edit Query” button
11. Click the “Where” tab
12. Change the *ProgramDate* to be the <u>last</u> day of the report period and *ProgramEndDate* to be the <u>first</u> day of the report period (see January example below).
13. Click the “Create” button



14. Optional: Click the “Drilldown” checkbox at the bottom of the “Ad-hoc Reports” screen (page 1 of these instructions) if you want to see client details. Leave it unchecked if you only want counts of clients (Commerce only requires the counts to be submitted).
15. Click the “Show Report” button at the bottom of the “Ad-hoc Reports” screen (page 1 of these instructions) to see the report in your web browser or the “Export as Excel” button to send the report into an Excel worksheet (for sorting and filtering purposes).

    If you clicked the “Show Report” button you may export the report to PDF (good for printing) or Excel by choosing the format and clicking “Export” after the report runs.

IMPORTANT: Please make sure any cells that contain client first or last names are deleted before sending us the report (via email or hardcopy). This is easier to do when you choose “Export to Excel”

A couple additional notes:

- If a program did not serve any clients during the report month it will not show up on the report.
- Any value of “# Error” in a row simply means that the values in that group couldn’t be “summed.” It doesn’t mean your report has an error. Please disregard any cell with “# Error” in it.